Teams, Triggers & Milestones

What are...

Teams: Name of the list you are generating.

Team Members: Members who will work with the people that populate the list.

Milestones: Tasks that the team members will complete for the people who populate the list.

Triggers: *(Push E-mail Notifications)* List of people you want pulled to populate the team.

How to connect with...

1x GIVERS

1. **Create your team**
   - Add your team members
   - Add your milestones: Letter, E-mail, Personal Phone Call

2. **Create your trigger**
   - Source- any household
   - Characteristic- new giver
     Look-back 30 days
     Amount- $5
     Gift Count- 1

3. **Select the team you want the results to populate in.**
   - Select who should receive email notifications for this trigger.

4. **Update the trigger to preview your results.**

2x GIVERS

1. **Create your team**
   - Add your team members
   - Add your milestones: Connection Call, Meeting, Email invitation for Next Steps (groups, classes, events, etc.)

2. **Create your trigger**
   - Source - team members, 1st time givers
   - Characteristic- new giver
     Look-back 60 days
     Amount- $20
     Gift Count- 2
     Fund Type - General

3. **Select the team you want the results to populate in.**
   - Select who should receive email notifications for this trigger.

4. **Update the trigger to preview your results.**

LAPSED GIVERS

1. **Create your team**
   - Add your team members
   - Add your milestones: Phone Call

2. **Create your trigger**
   - Source - any household
   - Characteristic- had a change in giving
     Recent Giving -
       Time Period - 0-90 days
       Gift Count- No more than 1
       Giving Total - $5 or more
     Prior Giving
       Time Period - 91-180 days
       Gift Count - at least 2
       Giving Total - $50 or more

3. **Select the team you want the results to populate in.**
   - Select who should receive email notifications for this trigger.

4. **Update the trigger to preview your results.**

RE-ENGAGED GIVERS

1. **Create your team**
   - Add your team members
   - Add your milestones: Pastoral Connection, Invitation for a Meeting

2. **Create your trigger**
   - Source - team members, lapsed givers
   - Characteristic- had a change in giving

     Recent Giving -

       Time Period - 0-90 days
       Gift Count- at least more than 1
       Giving Total - $20 or more

     Prior Giving

       Time Period - 91-180 days
       Gift Count - at least 1
       Giving Total - $5 or more

3. **Select the team you want the results to populate in.**
   - Select who should receive email notifications for this trigger.

4. **Update the trigger in order to preview your results.**

Need help building a strategy to connect with these givers? Contact us! We have strategy to fit all churches, no matter the size.

Contact Meagan Brown - meagan@mortarstone.com